

## ROUTING AND RECORD SHEET

SUBJECT: (Optional)

Revised OL Planning Calendar for Remainder of FY 88 for OL Planning Officers

STAT

FROM:

EXTENSION

NO.

STAT

OL/IMSS

DATE

9 June 1988

TO: (Officer designation, room number, and building)

DATE

OFFICER'S INITIALS

COMMENTS (Number each comment to show from whom to whom. Draw a line across column after each comment.)

RECEIVED

FORWARDED

STAT

1.

C/IMSS/OL

STAT

2.

C/P&amp;TS/OL

STAT

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C/PMS/OL

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C/SS/OL

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AC/AGC/OL

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6.

C/FMD/OL

3E14 Headquarters

STAT

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AC/CSG/OL

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AC/RECD/OL

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10.

C/SD/OL

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12.

15.

Attached is a Revised OL Planning Calendar for the Remainder of FY 88 and for early FY 89. Since the OL Quarterlies are to take place during the month following the end of the quarter, or as soon thereafter as possible, it is imperative that reports of activities and statistics for the quarters be received by IMSS on the dates shown. We appreciate your cooperation and hope that the planning calendar will be a useful tool for planning purposes.

Attachment:

As stated

Distribution:

- 1 - Each adse, w/att
- 1 - OL/IMSS/Official, w/att
- 1 - OL/IMSS/Chrono, w/att
- 8 -

OL/IMSS:

25X1

Revised OL Planning Calendar for Remainder of FY 88  
For OL Planning Officers

- \*10 Jun 88 - Suggested topics and speakers for 3rd Qtr FY 88 OL Quarterly are due from groups/divisions/staffs
- \*21 Jun 88 - Reports of 3rd-Qtr FY 88 activities are due from groups/divisions/staffs - to be used in update of significant activities at OL Quarterly
- \*27 Jun 88 Updated OL Emergency Procedures material is due from groups/divisions/staffs
- \*30 Jun 88 - Updated milestone charts, as of end of 3rd Qtr FY 88, for each Directorate- and Office-level objective are due from groups/divisions/staffs
- \* 6 Jul 88 - Statistics for 3rd Qtr FY 88 OL Quarterly are due from groups/divisions/staffs
- \*13 Jul 88 - Slides for 3rd Qtr FY 88 OL Quarterly are due from D&PC/P&PG
- 15 Jul 88 - Dry Run of 3rd Qtr FY 88 OL Quarterly - 2 p.m., 2C19  25X1
- 28 Jul 88 - 3rd Qtr FY 88 OL Quarterly - 10 a.m., Headquarters.
- 29 Jul 88 - 3rd Qtr FY 88 OL Quarterly - 10 a.m.,  Building.
- \* 2 Aug 88 - Updated portions of OL "Yellow Pages are due from groups/divisions/staffs
- \* 9 Sep 88 - Suggested topics and speakers for the 4th Qtr FY 88 OL Quarterly are due from groups/divisions/staffs

\*Date items are due in IMSS

Revised OL Planning Calendar for OL Planning Officers for  
Remainder of FY 88 (cont'd)

- \*20 Sep 88 - Reports of FY 88 activities (with graphics) are due from groups/divisions/staffs - to be used in making a video for the 4th Qtr FY 88 OL Quarterly and for other briefings. (Reports of 4th Qtr FY 88 activities are to be kept by groups, divisions and staffs but need not be sent to IMSS.)
- \*27 Sep 88 - FY 92 R&D requirements are due from groups, divisions and staffs - for submission (via the DDA) to DS&T. (This is a tentative date.)
- \*28 Sep 88 - (1) Proposed additional budget initiatives for FY 91 and new budget initiatives for FY 92 are due from groups/divisions/staffs - for discussion at the OL Planning Conference in October.  
  
(2) Proposed Directorate- and Office-level objectives for FY 89, along with projects for FY 89 and studies for FY 89, are due from groups/divisions/staffs, for discussion at the OL Planning Conference.
- \*30 Sep 88 - Updated milestone charts, as of the end of the 4th Qtr FY 88, for each FY 88 Directorate- and Office-level objective, are due from groups, divisions and staffs

\*Date items are due in IMSS.

OL PLANNING CALENDAR - FY 89  
For OL Planning Officers

- \* 3 Oct 88 - Updated OL "Yellow Pages" are due from OL/P&PG for distribution by OC/OL/ISC

Oct 88 - OL Planning Conference (dates to be determined)

- \* 6 Oct 88 - Statistics for FY 88 (for video) are due from groups/divisions/staffs. (Statistics for the 4th Qtr FY 88 should be kept by groups/divisions/staffs but need not be sent to IMSS.)

- \* 11 Oct 88 - Statistical slides for FY 88 are due from D&PC/P&PG and are to be delivered to Video Section/P&PG for inclusion in the video to be shown at the 4th Qtr FY 88 OL Quarterly

- \* 21 Oct 88 - Video is due from Video Section/P&PG - to be reviewed by IMSS prior to showing at the Dry Run of the 4th Qtr FY 88 OL Quarterly

24 Oct 88 - Dry Run of OL Quarterly for the 4th Qtr FY 88 - 10 a.m.,

25X1

3 Nov 88 - 4th Qtr FY 88 OL Quarterly - 10 a.m., Headquarters Auditorium

4 Nov 88 - 4th Qtr FY 88 OL Quarterly - 10 a.m.,   
Building

\*Date items are due in IMSS.

ANNUAL OL PLANNING CYCLE

- First week in Oct. - Due to IMSS from OL divs & staffs:
- (1) Proposed additional budget initiatives for two yrs. in advance and new budget initiatives for three years in advance for discussion at OL Planning Conference in Oct. Additional and new initiatives will be reviewed/modified during November and December at the directorate level and then submitted to the Comptroller in January.
  - (2) Proposed Directorate- and Office-level objectives, projects & studies for the new FY for discussion at OL Planning Conference in Oct.
  - (3) Report of previous fiscal year significant accomplishments (including statistical comparisons with year before previous year) - to be used in the overview at the OL Quarterly.
- Oct. OL Planning Conference at external site usually
- Oct Begin writing OL 5 Year Plan based on recent mgmt. direction, initiatives, objectives, projects, studies, results of OL Planning Conference, etc.
- Mid Oct Send memo to divs & staffs requesting inputs to 5 Year Plan & revised list of proposed initiatives, objectives, projects, and studies for new FY due to IMSS from group/div/staff chiefs last day in Oct.
- Oct/Nov/Dec - Program Call (or Plan) in Agency review stage - OL should be refining OL initiatives for 2-3 yrs. into future. The initial drafts of these should have been submitted to IMSS in Sept.
- Mid Nov Make updates to the previous OL Five-Year Plan for preparation of new OL Five-Year Plan including:
- (1) Milestone charts for each new FY objective:
    - ° Designated as Directorate- or Office-level.
    - ° Ranked (per D/L's Action Plan or updated plan) Group A (Critical), Group B (Essential), or Group C (Important).
  - (2) List of projects and studies for new FY
  - (3) Lists of additional budget initiatives for 2 yrs. in advance and new budget initiatives for 3 yrs. in advance
  - (4) Updates to the narrative portions (Introduction, Assumptions, Goals, Resource Implications, and OL's projections for the future).

## Annual OL Planning Cycle (cont'd)

STAT

Oct - 4th Qtr OL Quarterly Dry Run

Nov - 4th Qtr FY 87 OL Quarterly - Headquarters.

Nov - 4th Qtr FY 87 OL Quarterly -

Early Dec - Submit suggested topics and speakers for 1st Qtr FY 88 OL Quarterly to D/L

Mid Dec - Input for DCI's Annual Report to Congress (usually due in the DDA's office by the end of December).

Mid Dec Report of 1st-Qtr activities - to be used in update of significant activities at OL Quarterly.

Late Dec Ranking of initiatives by Group, Div., & Staff Chiefs

Last workday in Dec Updated milestone charts, as of end of 1st Qtr, for each Directorate- and Office-level objective.

Jan Final ranking of initiatives by D/L

Jan Submit OL 5 Year Plan in final to D/L

Jan Submit one-page summary descriptions of proposed new ranked initiatives to DDA for Comptroller.

Jan/Feb Comptroller review of proposed new initiatives.

Jan/Feb EXDIR releases final budget guidance - Instructions should come to OL from DDA Mgmt. Staff. OL develops it's budget for 2-3 yrs. into the future. The budget for 1-2 yrs. into the future goes to Congress for review. Narrative sections are to be developed by OL/B&F and OL/IMSS with inputs from OL divs and staffs.

Jan 1st Qtr OL Quarterly dry run

Jan 1st Qtr FY 88 OL Quarterly - Headquarters.

STAT Jan 1st Qtr FY 88 OL Quarterly -

Jan Begin writing of Kickoff "State of Union" (to occur in May) based on material collected thruout the year such as input to quarterlies, stats, significant accomplishments, Notes & Quotes, etc.

Jan Begin writing OL Annual Report & assembling graphics - based on photos & material collected thruout the year. Send memo to divs & staffs to solicit graphics & items

## Annual OL Planning Cycle (cont'd)

Feb	Submit updates of ongoing initiatives to DDA for Comptroller, including update of cpb-4 forms
Feb	Submit memo from D/L to DDA Mgmt. Staff with ranking of new initiatives and cpb-5 forms for each
Mid Feb	Items and graphics from divisions and staffs for OL Annual Report
Mar	OL Executive Conference (Arrangements to be made by EO and AEO).
Early Mar	Suggested topics and speakers for <u>2nd Qtr</u> OL Quarterly
Mar	Write "nine liners" for new initiatives
Mid Mar	Report of <u>2nd-Qtr</u> activities - to be used in update of significant activities at OL Quarterly
Mid Mar	First draft of D/L approved OL Annual Report to OL/P&PG
Last workday in Mar	Updated milestone charts, as of end of <u>2nd Qtr</u> , for each Directorate- and Office-level objective
Apr	Submit DA Standard Support Requirements initiatives to DDA for Comptroller.
Apr	Comptroller review of Budget for 2-3 years into the future
Apr	Dry Run OL Quarterly for <u>2nd Qtr</u>
Apr	2nd Qtr FY 88 OL Quarterly - Headquarters.
STAT Apr	2nd Qtr FY 88 OL Quarterly - <input type="text"/>
May	Begin making arrangements for OL Planning Conference to take place in Oct. <ul style="list-style-type: none"> <li>° rooms</li> <li>° conference room, slide proj., vugraph machine</li> <li>° coffee and danish, money for meals, etc.</li> <li>° etc.</li> </ul>
May	Kickoff to OL Conference "State of the Union" - Headquarters
STAT May	Kickoff to OL Conference "State of the Union" - <input type="text"/>
Mid May	Updated portions of OL Emergency Procedures.

Early Jun	Suggested topics and speakers for <u>3rd Qtr</u> OL Quarterly.
Early Jun	IMSS prepares OL Planning Guide for remainder of current FY & distributes to OL planning officers in groups, divs & staffs
Mid Jun	Report of <u>3rd-Qtr activities</u> - to be used in update of significant activities at OL Quarterly.
Last workday in Jun	Updated milestone charts, as of end of <u>3rd Qtr</u> for each Directorate- and Office-level objective.
Jul	ICS & OMB review of budget for 2-3 yrs. into future
Jul	Updated portions of "OL Yellow Pages"
Jul	3rd Quarter OL Quarterly dry run
Jul	3rd Qtr OL Quarterly - Headquarters.
STAT Jul	3rd Qtr OL Quarterly - <input type="text"/>
Aug	Write premature version of FY significant activities for DDA Mgmt. Staff
Aug	IMSS writes OL Planning Guide for the coming FY & distributes to OL planning officers
Early Sep	Proposed topics and speakers for <u>4th Qtr</u> OL Quarterly.
Early Sep	IMSS sends memo to divs & staffs asking for additional initiatives for 2 yrs. in advance & new for 3 yrs. in advance, & for objectives, projects and studies for the coming FY- due late Sep:
	(1) Proposed additional initiatives for 2 yrs. in advance & new initiatives for 3 yrs. in advance - for discussion at OL Planning Conference. Added & new initiatives will be reviewed/modified during Nov & Dec at directorate level & then submitted to Comptroller in Jan.
	(2) Proposed Directorate- and Office-level objectives for new FY along with projects and studies, for discussion at OL Planning Conference in Oct.
Early Sep	Report of <u>4th Qtr</u> activities (with graphics) - to be used in making a video for the OL Quarterly and for other briefings
Mid Sep	R&D requirements for 3 years in advance - for submission (via the DDA) to DS&T.
end of Sep	Updated milestone charts, as of end of <u>4th Qtr</u> , for each Directorate- and Office-level objective.